

**LIBRARY BOARD MEETING**  
**Monday, November 14, 2016**  
**Library Community Room, 5:00 P.M.**



**PLEASE TAKE NOTICE** that a meeting of the Brown Deer Library Board will be held in the Community Room at the Brown Deer Library, 5600 West Bradley Road, Brown Deer, Wisconsin at the above noted time and date, at which the following items of business will be discussed and possibly acted upon:

- I. Roll Call
- II. Call for Additional Agenda Items
- III. Persons Desiring to be Heard
- IV. Consideration of Minutes: October 10, 2016
- V. Unfinished Business:
  - a. Recap of Village Board 11/7 discussion of 2017 Village Budget
- VI. Report of Library Director
  - a. Director's Report
  - b. Usage Report
  - c. Revenue/Expense Report
- VII. New Business
  - a. Consideration of Vouchers: October 2016
  - b. Discussion-Unique Management Services (UMS) materials recovery service
- VIII. Report of Friends of the Library
- IX. Next meeting date
- X. Adjournment

A handwritten signature in black ink, appearing to read "B. Williams-Van Klooster", written over a horizontal line.

Brian Williams-Van Klooster, Library Director  
November 8, 2016

**BROWN DEER LIBRARY BOARD**  
**October 10, 2016 MEETING MINUTES**  
**HELD AT THE BROWN DEER PUBLIC LIBRARY**  
**5600 WEST BRADLEY ROAD**  
(Unapproved)

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The meeting was called to order by Director Williams-Van Klooster at 5:04 P.M.

**I. Roll Call**

Present: Board members: E. Bennett, J. Baker, W. Jabas, S. Snyder  
Also Present: Brian Williams-Van Klooster, Library Director  
Excused: President Lutz

**II. Call for Additional Agenda Items**

None

**III. Persons Desiring to be Heard**

None.

**IV. Consideration of Minutes:** September 12, 2016 – Regular Meeting

*It was moved by J. Baker and seconded by S. Snyder to approve the minutes of the September 12, 2016 regular meeting. The motion carried unanimously.*

**V. Unfinished Business**

- a. 2017 Library budget, Village budget and workshop presentation

The Library Director recommended that the Library Board amend its motion that instructs the him to request an increase in tax revenue allocation to the Library in light of recent Village department budget meetings that emphasized the financial challenges faced by the municipality in 2017. J. Baker shared information from the Village Manager's Report on specifically where financial challenges have originated. The Director noted that the Library's budget workshop presentation is the last of 6 agenda items on October 11, starting at 6PM.

*It was moved by W. Jabas and seconded by S. Snyder to approve an amended motion that rescinds instruction to the Library Director to request an increase in tax revenue allocation in an amount that would adjust staffing to include a full time adult librarian and return the book budget back to 2015 levels. The motion carried unanimously.*

- b. Consideration-Library book trucks purchase request

The Library Director reintroduced a fund balance purchase request for 6 (down from 8) book trucks. He noted that he projects the Library's fund balance to be at 16% at the close of 2016, after this purchase and other building maintenance overages are accounted for.

*It was moved by S. Snyder and seconded by W. Jabas to approve the purchase of 6 book trucks for \$2400. The motion carried unanimously.*

**VI. Report of Library Director**

- a. Director's Report

The Director highlighted the Student ID as Library Card project which he considers a successful collaboration with the School District and progress toward a Library Strategic Goal, an update on the extended MPL fine forgiveness campaign, two donations totaling \$1500, and a letter of appreciation from the Elks Lodge.

- b. Usage Report

There were no verbal highlights or discussion of the report.

- c. Revenue/Expense Report

There were no verbal highlights or discussion of the report.

**VII. New Business**

- a. Consideration of Vouchers: September 2016

It was moved by W. Jabas and seconded by E. Bennett to approve the payment of the September 2016 vouchers. The motion carried unanimously.

b. Discussion-Community Room demand

The Director shared use statistics that show a steady increase in non-library community room use since 2013. He asked for Board direction on continuing to meet demand in light of 2017 staffing reductions and the staff resources needed to administer the room use. There was a general opinion that room use by the community is an important part of the Library's range of services and efforts should be made to prioritize staff resources to maintain its availability.

c. Discussion-communication plan for 2017 service changes

The Director asked for Board direction on public communication about 2017 service changes. There was a general opinion that the benefits of the service changes should be emphasized, as well as the upcoming building anniversary.

d. Discussion-Patron Survey in *Our Brown Deer Magazine*

The Director informed the Board that the Library biannual patron survey will be a 1-page double-side tear-out in the Winter magazine. He noted that magazine survey returns will be dependent upon respondent's attaching a stamp and dropping in the mail or returning to the library in person, and will be a shortened version of the in-library and online survey. S. Snyder recommended that a small incentive for returning surveys be offered.

e. Review and Approval – Job descriptions

The Director presented previous and revised versions of job descriptions for two new positions, Part Time Adult Services Librarian and Library Circulation Supervisor. He said that computer and customer service skills testing will be a component of recruitment for the Librarian, and the other positions are internal promotion.

It was moved by W. Jabas and seconded by S. Snyder to approve the new job descriptions as presented. The motion carried unanimously.

**VIII. Report of Friends of the Brown Deer Library**

W. Jabas said the annual Auction will be Thursday November 10. Postcards announcing the event were sent to past attendees, and reminder bookmarks will be dropped off to the library soon.

**IX. Adjournment**

**Next meeting: November 14, 2016.** It was moved by E. Bennett and seconded by S. Snyder to adjourn at 6:10 P.M. The motion carried unanimously.



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Brian Williams-Van Klooster, Library Director  
October 12, 2016

# Brown Deer Public Library - Director's Report

## October 2016

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### Budget

- Trustees Budget Workshop had minimal discussion regarding Library, Trustee Boschert said he felt the proposed staffing and hours changes were a reasonable response to the Library's budget situation

### Facility

- Several carpet stains cleaned in reading room, dead bulbs in lobby skylights replaced with super-life LEDs
- Patio completed by Eagle Scout, new weather resistant furniture purchased with donation funds, to be assembled by Scout, one bench has 'Friends of the Brown Deer Library' engraved in back, 7 juniper bushes planted by block wall

### Meetings & Training

- 10/4 Village Department Heads
- 10/4 2017 Library programming discussion
- 10/4 Webinar-trends in library spaces and furnishings
- 10/5 Presentation to BD Senior Citizen Club on Recollection Wisconsin content
- 10/6 MCFLS LDAC
- 10/6 Webinar-libraries of the future
- 10/10 BDPL Board
- 10/11 BDPL monthly staff meeting
- 10/11 Trustees Budget Workshop
- 10/18 Village Department Heads

### Marketing/Communication/Outreach/PR

- New Brown Deer Winter Market to be held in Library Community Room, Saturdays 1x/month Nov 2016-March 2017 (flyer attached)
- Our Brown Deer Magazine Winter issue content submitted, to be in mailboxes approximately 12/15

### Staff

- One Library Assistant attended two-day Back in Circulation Again conference in Madison, notes to be shared with all staff via email and staff meeting
- 4 staff attended a full or half day at Wisconsin Library Association conference in Milwaukee, notes to be shared with all staff by email and discussed at upcoming staff meeting
- Recruitment for Librarian will start on 11/1, posting to the web only

### Statistics

- Created chart comparing 3 major types of use data (visits, checkouts, quantity of books) for public libraries in groups of Wisconsin, MCFLS and BDPL from 2007-2015 to show that BDPL experiences the same types of trends as other public libraries in the state

### Miscellaneous

- Several new local history documents uploaded to Recollection Wisconsin, including all Brown Deer Historical Society publications and 1965 special issue of Brown Deer Herald celebrating 10<sup>th</sup> anniversary of incorporation



# Brown Deer Local History

Hosted by Milwaukee Public Library



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## Brown Deer Local History

### About this collection

This collection is a collaboration of the Brown Deer Public Library and the Brown Deer Historical Society.

Currently available:

- [Brown Deer Historical Society Newsletter](#), published quarterly since 1973.
- [Brown Deer History Research Narratives](#) contains various reports and unpublished documents about the general history of the Village, from the the Historical Society archives.
- [Brown Deer Historical Society Pamphlets](#) includes published brochures, booklets and pamphlets about the general history of the Village. Included are *The Brown Deer Heritage Almanac* and *Brown Deer's Little White Schoolhouse* brochure.
- [Happy Birthday Brown Deer](#) is a special section of the 1965 Herald newspaper celebrating the Village's 10th anniversary of incorporation. It contains Village history, statistics, business listings, government information and historic photographs.

Learn more about Brown Deer history at the village website:

<http://www.browndeerwi.org/about-us/history/>

Find more Brown Deer local history sources at the Brown Deer Public Library:

<http://goo.gl/3WQ55i>

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# Children's / Young Adult Services

## From Dana's monthly report

- Our Star Wars Reads program ran from October 3<sup>rd</sup> through October 15<sup>th</sup>, and included a Star Wars-themed Lego Club, 2 movie afternoons, and 2 drop-in craft programs. The craft programs were a huge success, and I received lots of inquiries on when the next drop-in programs will be. There was a book display by the reference desk, and a book was raffled off. 57 people entered the raffle.
- Solicited the Brown Deer Walgreens for help with my Halloween Pumpkin Party, and was generously given a \$50 gift card to buy treats and decorations with. Will be sending the Walgreens manager a thank you card, along with photos from the event.
- Am planning a passive program similar to our "Roaming Gnome" for the month of November. A stuffed turkey will be hidden in the library, and when found may be returned to the reference desk for a small prize each time. Children definitely pester their parents to come to the library to find the Gnome, so the Turkey should work too!
- Have begun planning the 2017 children and teen summer reading programs, and one performer has already been booked.
- Am in talks with a local resident on setting up a Read to Rover program.
- I continued to update the library's website, Facebook and Pinterest pages. I also continued to update the library's street sign, and to book/confirm groups wanting to use the community room.

## Programs:

- Story time sessions, 19 total, 29 participants average
- Movie Nights, 4 screenings, 41 participants total, evening movies do better than after school movies
- Lego Club, 1 evenings, 11 participants total; Afternoon Gaming, 1 program, 6 participants

## Meetings & Training

- 10/14 Workshop at Cedarburg Library: "Youth Services Workshop 2016"
- 10/26 Webinar: "Makerspaces 2.0: Don't Just Build a Makerspace; Create a Makerhub"

## Miscellaneous

- Continued coordination of existing volunteer
- 

# Adult Services

## Displays

- *Scary movies and Ghost stories* for Halloween

## Materials

- Over 490 catalog records added or modified.

## Programs

- 10/6 Movies for Grown Ups—18 attended, watched The Intern.
- 10/19 Adult Book Club—Discussed The 13thTale by Diane Setterfield, 16 Attended, Led by Rebekah.
- 10/21 Coloring, Coffee and Conversation – 11 attended

## Meetings & Training

- 10/27 attended WLA in Milwaukee

## Miscellaneous

- Trained new volunteer for shelf reading, received 2 new volunteer applications
- Created the November Page Schedule.
- Showed Rebekah how to run the monthly Missing and Cat Flag J lists

- Continued to review and discarded fiction items pulled by volunteer with no circulation in the last 4 years.
- Weeded the Adult Audiobook collection
- Cataloged new nonfiction, DVDs, Informational DVDs, Large Print Nonfiction and Adult audiobooks and gift items in the same areas
- Worked on the monthly missing list and the Cat Flag J list
- Ordered DVDs, worked on print orders, but still waiting to send in hopes of additional gift money.
- Began clearing out 36.5 years of files.

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## MCFLS / Other

- Milwaukee Public Library Fine Forgiveness: Judy Pinger discussed MPL's fine amnesty program, including the pitfalls that resulted from the broadcast of incorrect information (one station reported that you can return your books to Milwaukee Public Museum or that any library in the County is offering fine forgiveness). Suburban libraries shared their concerns and ideas, particularly that if MPL does this again, they'd like more notice so they can consider participating.
- Hoopla 2017 Budgeting: At the last meeting Bruce shared that the anticipated cost for one year of Hoopla service would \$77,000, for downloadable ebooks, audiobooks, music, and movies. The Hoopla rep since revised the estimate, this time \$16,087.68 per month, or \$193,052.16 annually. The directors responded with many questions, and offered a variety of scenarios if MCFLS would still like to try the service. Bruce will take a closer look at the service and find out what others who use Hoopla actually think of it.



Brown Deer's  
**Winter Market**

**Saturday, November 19**

Saturday, December 10

Saturday, January 14

Saturday, January 28

Saturday, February 11

Saturday, February 25

Saturday, March 11

Saturday, March 25

10:00 am – 2:00 pm

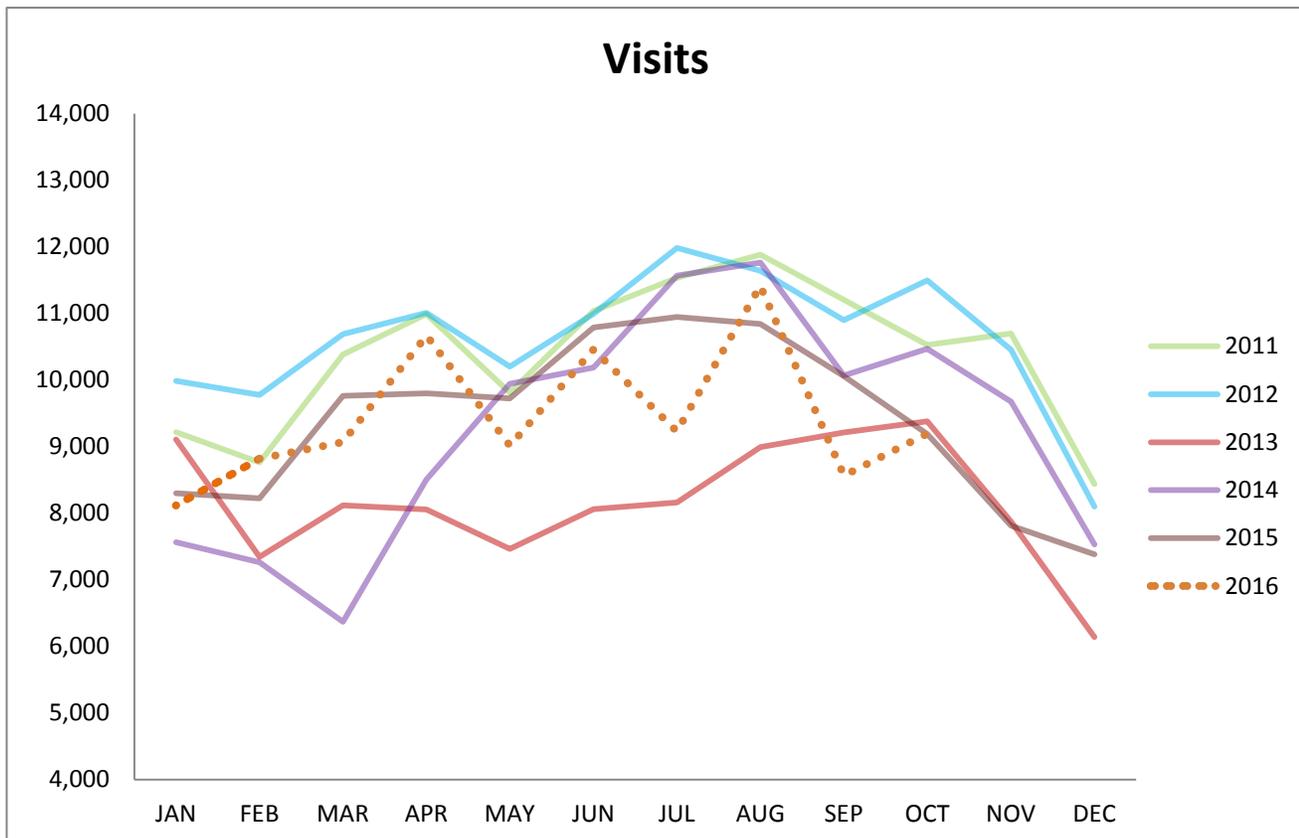
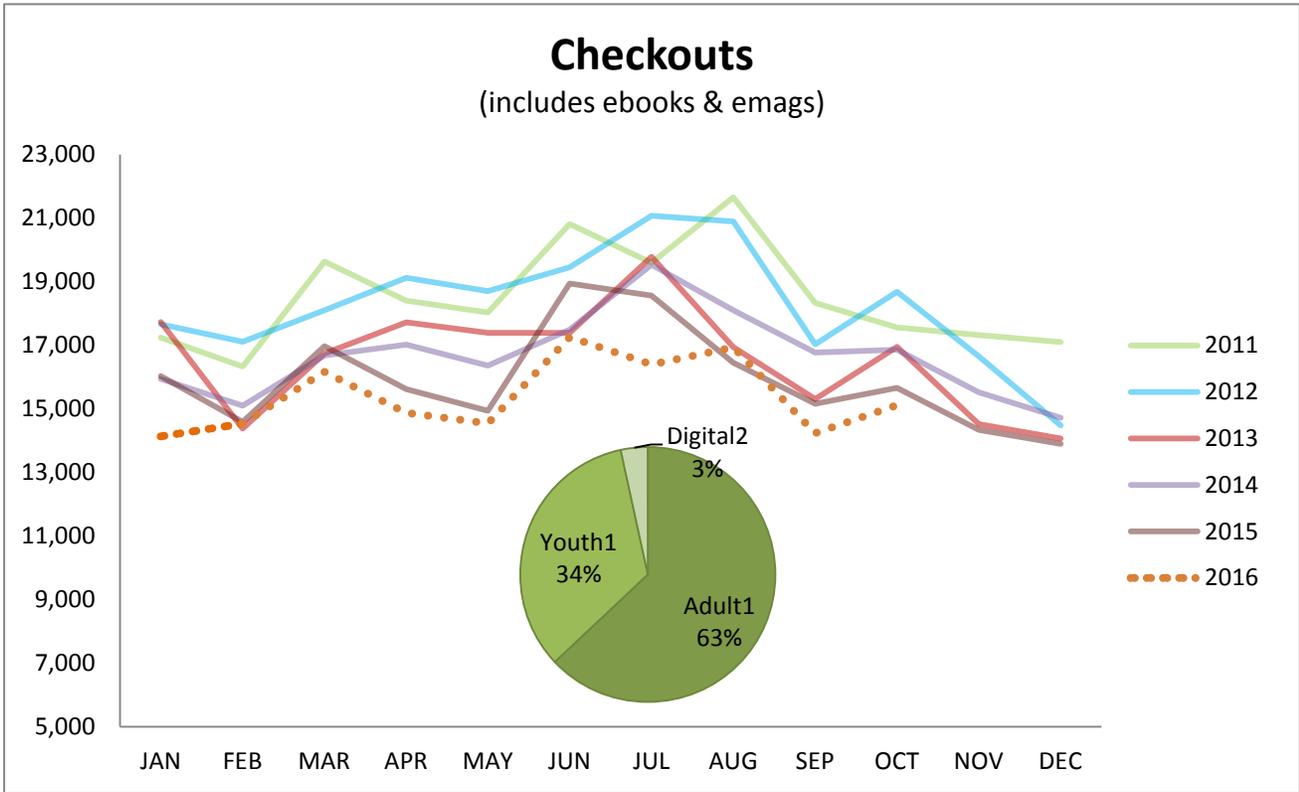
Brown Deer Public Library

**5600 W. Bradley Road/ Brown Deer, WI / 53223**

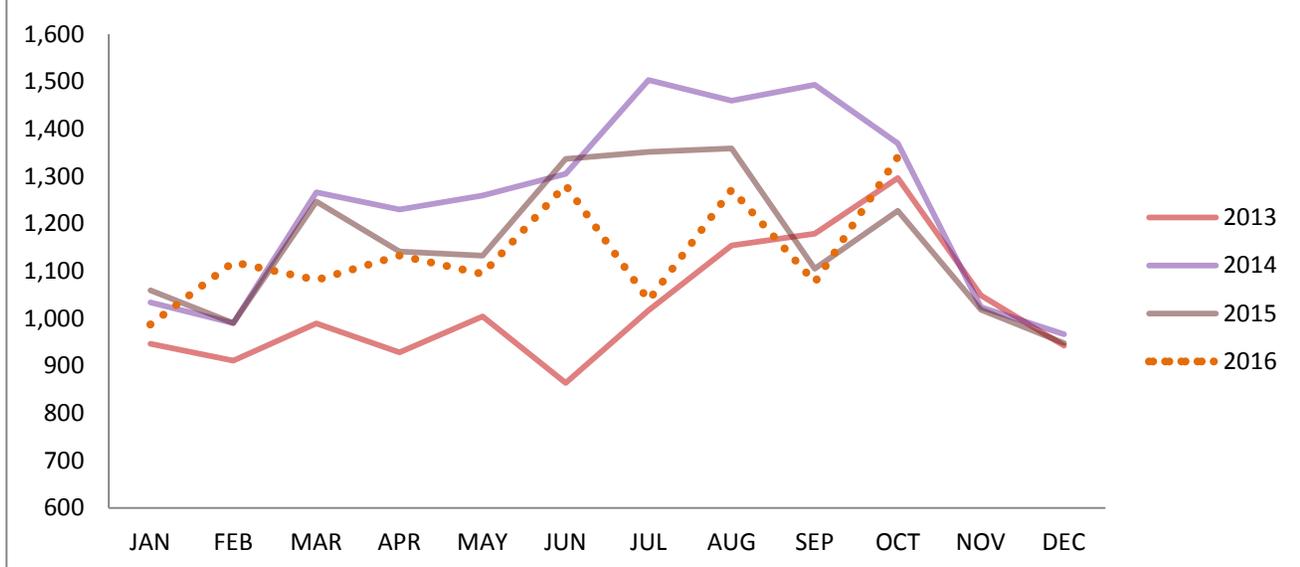
Come and purchase winter wonders like canned goods,  
homemade soap, delicious sweets, crafts, & more!

**Sponsored by the Brown Deer Farmers Market & the  
Brown Deer Public Library.**





## Hours of Computer Use



	<b>Reserves/Holds</b>				<b>Programs</b>						
	Staff assisted holds <sup>1</sup>	% change from last year	Holds Pulled at BD <sup>8</sup>	% change from last year	Juv/YA pgms <sup>6</sup>	Juv/YA attend <sup>6</sup>	Adult pgms <sup>6</sup>	Adult attend <sup>6</sup>	Total attend	% Attend change from last	Notes
<b>JAN</b>	381	-13%	1,635	-27%	6	106	3	28	134	91%	
<b>FEB</b>	418	1%	1,715	12%	13	274	3	35	309	-12%	
<b>MAR</b>	424	-8%	1,561	-12%	13	243	2	23	266	-34%	
<b>APR</b>	393	-11%	1,231	-19%	9	125	4	39	164	-37%	
<b>MAY</b>	351	2%	1,488	10%	5	86	3	23	109	54%	
<b>JUN</b>	391	-10%	1,444	-8%	15	158	3	31	189	-42%	
<b>JUL</b>	363	-13%	1,604	7%	17	205	2	24	229	-66%	
<b>AUG</b>	447	32%	1,670	23%	9	84	3	31	115	-69%	
<b>SEP</b>	383	0%	1,277	-12%	7	110	5	100	210	1%	
<b>OCT</b>	412	4%	1,566	11%	16	347	3	45	392	14%	
<b>NOV</b>		-									
<b>DEC</b>		-									
<b>TOTAL</b>	3,963		15,191	0	110	1,738	31	379	2,117	-10%	

**CIRCULATION**

	2016				2015			
	ADULT	YOUTH	DIGITAL	TOTAL	ADULT	YOUTH	DIGITAL	TOTAL
JAN.	9,299	4,350	486	14,135	10,695	4,883	450	16,028
FEB.	9,166	4,863	502	14,531	9,314	4,841	439	14,594
MARCH	9,916	5,768	480	16,164	10,648	5,833	487	16,968
APRIL	9,801	4,564	513	14,878	10,079	5,031	513	15,623
MAY	9,244	4,708	594	14,546	9,796	4,637	503	14,936
JUNE	10,340	6,381	532	17,253	11,039	7,393	516	18,948
JULY	9,996	5,890	507	16,393	11,088	6,909	570	18,567
AUGUST	10,886	5,462	590	16,938	10,654	5,287	514	16,455
SEPT.	9,165	4,524	546	14,235	9,685	5,014	459	15,158
OCT.	9,326	5,285	509	15,120	9,654	5,446	559	15,659
NOV.	0	0	0	0	8,924	4,736	676	14,336
DEC.	0	0	0	0	9,237	4,131	528	13,896
<b>TOTAL</b>	<b>97,139</b>	<b>51,795</b>	<b>5,259</b>	<b>154,193</b>	<b>120,813</b>	<b>64,141</b>	<b>6,214</b>	<b>191,168</b>

**RESERVES/HOLDS**

	2016	2015	Paging	Paging
			slips '16	slips '15
Jan.	381	438	1,635	2,252
Feb.	418	414	1,715	1,531
Mar.	424	462	1,561	1,781
April	393	441	1,231	1,520
May	351	344	1,488	1,353
June	391	434	1,444	1,568
July	363	415	1,604	1,495
Aug.	447	339	1,670	1,355
Sept.	383	383	1,277	1,448
Oct.	412	397	1,566	1,409
Nov.	0	289	0	1,417
Dec.	0	315	0	1,396
<b>Total:</b>	<b>3,963</b>	<b>4,671</b>	<b>15,191</b>	<b>18,525</b>

**COMPUTER USE**

	2016			2015
	Hours used	% of Capacity	% hours used vs. last year	Hours used
JAN.	987	40%	-6.8%	1,059
FEB.	1,118	47%	12.9%	990
MARCH	1,081	43%	-13.2%	1,246
APRIL	1,133	45%	-0.7%	1,141
MAY	1,094	47%	-3.4%	1,133
JUNE	1,281	51%	-4.1%	1,336
JULY	1,038	45%	-23.2%	1,352
AUGUST	1,272	49%	-6.4%	1,359
SEPT.	1,077	47%	-2.6%	1,105
OCT.	1,340	54%	9.2%	1,227
NOV.	0	-	-	1,019
DEC.	0	-	-	948
<b>TOTAL</b>	<b>11,421</b>	<b>47%</b>	<b>-3.8%</b>	<b>13,914</b>

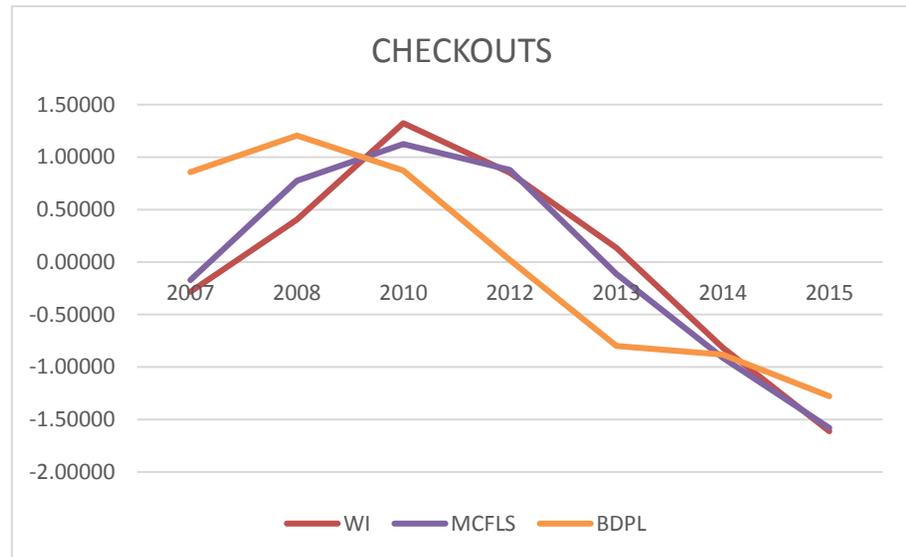
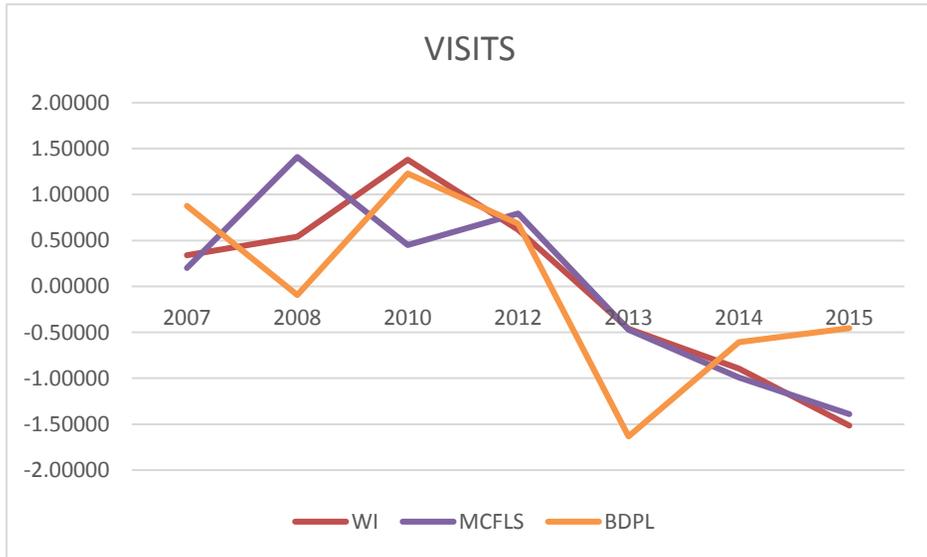
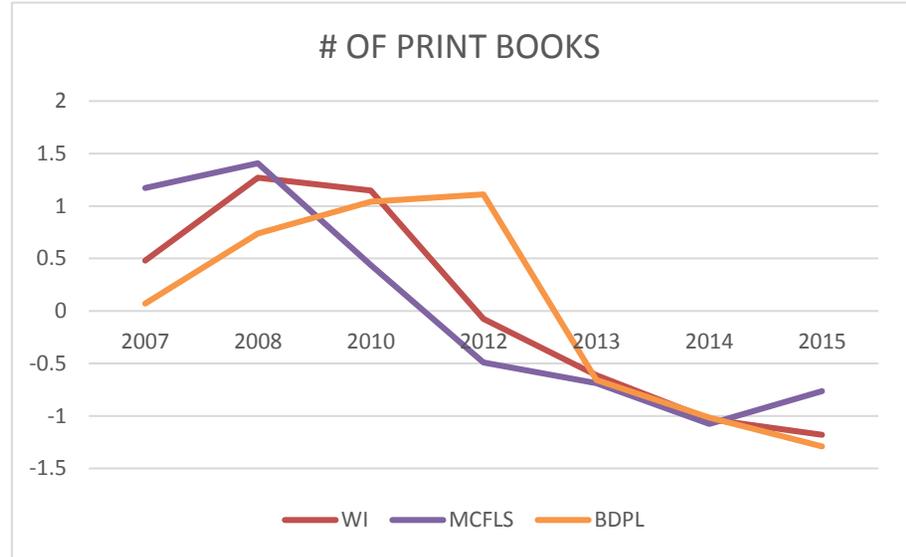
**PROGRAMS**

	2016				2015	
	Juv/YA Prog	Juv/YA Attend	Adult Prog	Adult Attend	Total	Total
	6	106	3	28	134	70
	13	274	3	35	309	351
	13	243	2	23	266	401
	9	125	4	39	164	261
	5	86	3	23	109	71
	15	158	3	31	189	327
	17	205	2	24	229	665
	9	84	3	31	115	373
	7	110	5	100	210	207
	16	347	3	45	392	344
	0	0	0	0		294
	0	0	0	0		203
<b>TOTAL</b>	<b>110</b>	<b>1,738</b>	<b>31</b>	<b>379</b>	<b>2,117</b>	<b>3,567</b>

**BUILDING USE**

2016	2015
8,114	8,300
8,820	8,221
9,065	9,762
10,666	9,802
9,014	9,722
10,455	10,788
9,230	10,948
11,415	10,844
8,565	10,060
9,198	9,190
0	7,811
0	7,384
<b>94,542</b>	<b>112,832</b>

Normalized\* use data  
 from WI DPI reports, 2007-2015:  
 Wisconsin PLs, MCFLS, Brown Deer PL



\*Standard deviation from the mean for 3 different scales of data

User: BRIAN

DB: Brown Deer

PERIOD ENDING 10/31/2016

GL NUMBER	DESCRIPTION	ACTIVITY FOR		YTD BALANCE 10/31/2016	2016 AMENDED BUDGET	AVAILABLE		% BDGT USED
		MONTH 10/31/2016	INCREASE (DECREASE)			NORMAL	(ABNORMAL)	
Fund 151 - Library Fund								
Revenues								
Dept 000-11-TAXES								
151-000-11-4-00-10	General Property Taxes	0.00	385,346.01	385,346.00	(0.01)	100.00		
Total Dept 000-11-TAXES		0.00	385,346.01	385,346.00	(0.01)	100.00		
Dept 000-67-PARKS & CULTURE/RECREATION								
151-000-67-4-10-10	Photocopies	1,178.23	8,125.30	6,500.00	(1,625.30)	125.00		
151-000-67-4-10-20	Library-Fines	2,637.32	15,311.09	16,000.00	688.91	95.69		
151-000-67-4-10-30	Sale of Materials	196.35	1,275.48	900.00	(375.48)	141.72		
151-000-67-4-10-40	Lost Material Charges	246.42	1,759.73	1,500.00	(259.73)	117.32		
151-000-67-4-10-90	Miscellaneous Charges	470.80	3,791.91	4,000.00	208.09	94.80		
Total Dept 000-67-PARKS & CULTURE/RECREATION		4,729.12	30,263.51	28,900.00	(1,363.51)	104.72		
Dept 000-73-INTERGOVERNMENTAL CHARGES								
151-000-73-4-60-10	MCFLS-Reciprocal Borrowing	0.00	87,166.00	86,734.00	(432.00)	100.50		
Total Dept 000-73-INTERGOVERNMENTAL CHARGES		0.00	87,166.00	86,734.00	(432.00)	100.50		
Dept 000-81-INTEREST INCOME								
151-000-81-4-00-10	Investment Interest	0.00	606.51	0.00	(606.51)	100.00		
Total Dept 000-81-INTEREST INCOME		0.00	606.51	0.00	(606.51)	100.00		
Dept 000-82-MISCELLANEOUS REVENUE								
151-000-82-4-00-10	Rent Income	0.00	28,325.00	33,000.00	4,675.00	85.83		
Total Dept 000-82-MISCELLANEOUS REVENUE		0.00	28,325.00	33,000.00	4,675.00	85.83		
Dept 000-84-INSURANCE RECOVERIES								
151-000-84-4-00-50	Insurance Recovery-Prop Damage	0.00	0.00	0.00	0.00	0.00		
Total Dept 000-84-INSURANCE RECOVERIES		0.00	0.00	0.00	0.00	0.00		
Dept 000-85-DONATIONS								
151-000-85-4-50-10	Donations - Library	645.00	10,265.22	8,000.00	(2,265.22)	128.32		
Total Dept 000-85-DONATIONS		645.00	10,265.22	8,000.00	(2,265.22)	128.32		
TOTAL Revenues		5,374.12	541,972.25	541,980.00	7.75	100.00		
Expenditures								
Dept 510-51-92400								
151-510-51-5-10-10	Salaries/Wages	23,400.10	246,570.62	313,035.00	66,464.38	78.77		
151-510-51-5-11-10	Part-time/Temporary	0.00	0.00	0.00	0.00	0.00		
151-510-51-5-15-10	WI Retirement	1,333.33	13,851.45	18,072.00	4,220.55	76.65		
151-510-51-5-15-15	FICA	1,741.32	18,358.14	22,947.00	4,588.86	76.66		
151-510-51-5-15-20	Group Insurance	4,344.72	43,448.70	52,715.00	9,266.30	82.42		

PERIOD ENDING 10/31/2016

GL NUMBER	DESCRIPTION	ACTIVITY FOR		YTD BALANCE 10/31/2016	2016 AMENDED BUDGET	AVAILABLE		% BGDG USED
		MONTH 10/31/2016	INCREASE (DECREASE)			NORMAL (ABNORMAL)	BALANCE (ABNORMAL)	
Fund 151 - Library Fund								
Expenditures								
151-510-51-5-15-25	Workers Comp Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
151-510-51-5-20-35	Technical Services	0.00	2,399.55	3,100.00	700.45	77.40		
151-510-51-5-20-40	Printing Services	433.53	4,677.96	4,500.00	(177.96)	103.95		
151-510-51-5-24-10	Equipment Maintenance Services	525.00	15,804.25	16,500.00	695.75	95.78		
151-510-51-5-30-10	Office Supplies, Equip & Exp	654.25	4,468.36	3,700.00	(768.36)	120.77		
151-510-51-5-30-15	Postage & Mailing	0.00	119.69	380.00	260.31	31.50		
151-510-51-5-30-20	Communications	21.55	2,400.80	700.00	(1,700.80)	342.97		
151-510-51-5-45-10	Professional Memberships	0.00	174.00	500.00	326.00	34.80		
151-510-51-5-45-20	Professional Publications	0.00	0.00	0.00	0.00	0.00		
151-510-51-5-45-30	Professional Training	0.00	0.00	700.00	700.00	0.00		
151-510-51-5-45-40	Mileage Reimbursement	571.79	657.65	400.00	(257.65)	164.41		
Total Dept 510-51-92400		33,025.59	352,931.17	438,249.00	85,317.83	80.53		
Dept 511-51								
151-511-51-5-35-40	Collect Repair/Maint/Suppl	156.05	4,084.45	4,100.00	15.55	99.62		
151-511-51-5-38-10	Periodicals	325.00	2,823.03	3,000.00	176.97	94.10		
151-511-51-5-38-15	Books	902.50	27,129.22	38,000.00	10,870.78	71.39		
151-511-51-5-38-20	Audio/Visual	7.45	8,959.28	11,600.00	2,640.72	77.24		
151-511-51-5-38-25	Library Grant Materials	0.00	0.00	0.00	0.00	0.00		
151-511-51-5-38-30	Donation Expenditures	96.99	3,393.10	8,000.00	4,606.90	42.41		
151-511-51-5-38-40	Library Programming	28.90	349.08	1,000.00	650.92	34.91		
Total Dept 511-51		1,516.89	46,738.16	65,700.00	18,961.84	71.14		
Dept 512-51								
151-512-51-5-22-10	Natural Gas/Electric Service	1,426.98	15,232.65	17,000.00	1,767.35	89.60		
151-512-51-5-22-20	Sewer/Water Services	0.00	0.00	600.00	600.00	0.00		
151-512-51-5-23-10	Cleaning Services	1,200.00	12,000.00	14,800.00	2,800.00	81.08		
151-512-51-5-23-15	Building Maint/Repair Services	675.78	14,596.65	4,431.00	(10,165.65)	329.42		
151-512-51-5-35-10	Building Supplies	473.39	1,754.51	1,200.00	(554.51)	146.21		
Total Dept 512-51		3,776.15	43,583.81	38,031.00	(5,552.81)	114.60		
Dept 512-92								
151-512-92-5-40-10	Transfer to Capital Imprvmt	0.00	0.00	0.00	0.00	0.00		
Total Dept 512-92		0.00	0.00	0.00	0.00	0.00		
TOTAL Expenditures		38,318.63	443,253.14	541,980.00	98,726.86	81.78		
Fund 151 - Library Fund:								
TOTAL REVENUES		5,374.12	541,972.25	541,980.00	7.75	100.00		
TOTAL EXPENDITURES		38,318.63	443,253.14	541,980.00	98,726.86	81.78		
NET OF REVENUES & EXPENDITURES		(32,944.51)	98,719.11	0.00	(98,719.11)	100.00		

JOURNALIZED  
BOTH OPEN AND PAID

GL Number	GL Desc	Vendor	Invoice Desc.	Invoice	Chk Date	Amount	check #
Fund 151 Library Fund							
Dept 510-51 92400							
151-510-51-5-24-10	Equipment Maintenance Serv	CREATE CUT INVENT/CLOS	MONTHLY HARDWARE/SOFTWARE SERVICE A	4TH 2016	10/14/16	525.00	83681
151-510-51-5-30-10	Office Supplies, Equip &	E CLEAR CUT PRINT SOLUTI	COPY PAPER	2195	10/07/16	342.00	83629
151-510-51-5-30-10	Office Supplies, Equip &	WILLIAMS-VAN KLOOSTER,	CERAMIC POTS, FOLDING CHAIR, CABLE,	08122016	10/14/16	10.49	83723
151-510-51-5-30-10	Office Supplies, Equip &	E COMPLETE OFFICE OF WIS	2017 CALENDARS, TAPE	669686	10/28/16	196.53	83738
151-510-51-5-30-10	Office Supplies, Equip &	E THE LIBRARY STORE INC	MAGNETIC LABEL HOLDERS	229451	10/28/16	53.37	83772
151-510-51-5-30-20	Communications	AT & T	SERVICE	10102016	10/14/16	21.55	83672
151-510-51-5-45-40	Mileage Reimbursement	HAASE, SANDRA JOY	JAN-SEPT 2016 MILEAGE REIMBURSEMENT	10032016	10/07/16	122.36	83639
151-510-51-5-45-40	Mileage Reimbursement	MOSEY, SARA	MILEAGE, LODGING, MEALS-CONFERENCE	10242016	10/28/16	449.43	83758
Total For Dept 510-51 92400						1,720.73	
Dept 511-51							
151-511-51-5-35-40	Collect Repair/Maint/Suppl	DEMCO	BOOK TAPE, NAME TAGS	5962144	10/07/16	112.20	83632
151-511-51-5-35-40	Collect Repair/Maint/Suppl	A M I CORP	AUDIOBOOK PAGES	24137	10/28/16	43.85	83726
151-511-51-5-38-10	Periodicals	JOURNAL SENTINEL INC	ANNUAL RENEWAL	10272016	10/28/16	325.00	83747
151-511-51-5-38-15	Books	BAKER & TAYLOR	3 REFERENCE BOOKS	5014273730	10/07/16	33.61	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032298336	10/07/16	14.86	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032298337	10/07/16	15.93	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	2 BOOKS	2032298338	10/07/16	29.74	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032298339	10/07/16	8.69	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032298340	10/07/16	12.21	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	3 BOOKS	2032298341	10/07/16	43.01	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032298342	10/07/16	14.87	83627
151-511-51-5-38-15	Books	BAKER & TAYLOR	19 BOOKS	2032304320	10/07/16	164.27	83627
151-511-51-5-38-15	Books	INGRAM LIBRARY SERVICE	BOOK	94887661	10/07/16	5.19	83640
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032322778	10/28/16	14.33	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032322779	10/28/16	14.34	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	BOOK	2032322780	10/28/16	14.84	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	2 BOOKS	2032322782	10/28/16	24.35	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	3 BOOKS	2032322783	10/28/16	43.00	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	6 BOOKS	2032322781	10/28/16	78.25	83732
151-511-51-5-38-15	Books	BAKER & TAYLOR	52 BOOKS	2032334672	10/28/16	365.82	83732
151-511-51-5-38-15	Books	INGRAM LIBRARY SERVICE	BOOK	93770803	10/28/16	5.19	83746
151-511-51-5-38-20	Audio/Visual	BAKER & TAYLOR	AUDIOBOOK	203229834	10/07/16	19.04	83627
151-511-51-5-38-20	Audio/Visual	BAKER & TAYLOR	CREDIT	2854193	10/07/16	(11.59)	83627
151-511-51-5-38-30	Donation Expenditures	WILLIAMS-VAN KLOOSTER,	CERAMIC POTS, FOLDING CHAIR, CABLE,	08122016	10/14/16	96.99	83723
151-511-51-5-38-40	Library Programming	WILLIAMS-VAN KLOOSTER,	CERAMIC POTS, FOLDING CHAIR, CABLE,	08122016	10/14/16	7.49	83723
Total For Dept 511-51						1,495.48	
Dept 512-51							
151-512-51-5-22-10	Natural Gas/Electric Servi	WE ENERGIES	SERVICE	10272016	10/28/16	54.03	83778
151-512-51-5-22-10	Natural Gas/Electric Servi	WE ENERGIES	SERVICE	100272016A	10/28/16	1,372.95	83778
151-512-51-5-23-10	Cleaning Services	GIBB BUILDING MAINTENA	MONTHLY CLEANING SERVICE	12611	10/14/16	1,200.00	83685
151-512-51-5-23-15	Building Maint/Repair Serv	WILLIAMS-VAN KLOOSTER,	LANDSCAPE EDGE	10242016	10/28/16	49.97	83781
151-512-51-5-35-10	Building Supplies	NASSCO INC	WIPES	S2094763.001	10/07/16	31.67	83647
151-512-51-5-35-10	Building Supplies	NASSCO INC	HAND TOWELS, PAPER TOWELS, AIR FRES:	S2095533.001	10/07/16	107.30	83647
151-512-51-5-35-10	Building Supplies	BATTERIES PLUS	LIGHT BULBS	545-284082	10/28/16	299.90	83733
151-512-51-5-35-10	Building Supplies	NASSCO INC	RUBBER GLOVES, DEODERIZER	S2106847.001	10/28/16	28.94	83760
151-512-51-5-35-10	Building Supplies	NASSCO INC	REPLACEMENT SPINDLE	S2100371.001	10/28/16	5.58	83760
Total For Dept 512-51						3,150.34	
Total For Fund 151 Library Fund						6,366.55	

11/01/2016 04:05 PM  
User: BRIAN  
DB: Brown Deer

INVOICE GL DISTRIBUTION REPORT FOR VILLAGE OF BROWN DEER  
POST DATES 10/01/2016 - 10/31/2016  
JOURNALIZED  
BOTH OPEN AND PAID

GL Number	GL Desc	Vendor	Invoice Desc.	Invoice	Chk Date	Amount	check #
			Fund Totals:				
			Fund 151 Library Fund			6,366.55	
			Total For All Funds:			<u>6,366.55</u>	

- MCFLS member libraries' procedure for contacting patrons regarding outstanding materials and fees
  - MCFLS Procedures C-85 and C-52 (attached)
- UMS collection/materials recovery services (from LDAC meeting discussions in July, August and September 2016)
  - General information (brochure attached)
    - Applies to patrons for whom fees exceed a predetermined amount and include at least one item in 'Billed' status
    - All collection/recovery action is based on the owning library rules and processes.
    - Law no longer allows library fees to be recorded on credit reports.
    - UMS does not have specific information about materials for which patrons have been referred (privacy law).
    - Patrons need to work directly with MCFLS libraries to find out what materials are outstanding.
    - Not used for patrons under 15 years of age
    - \$8.95 per referral, this cost is passed on to the patron account in the form of a manual charge, the total amount determined by the contracting library
    - Does material recovery for 1,700 library customers in the United Kingdom, North America, Australia and New Zealand. Has 75 employees in Jeffersonville, IN. 50 of those are in the call center, half of whom are seminary students making calls. Uses a "gentle nudge" technique, as no legal action can be taken in the case of non-recovery.
  - MPL experience
    - Milwaukee considers the current arrangement with UMS very successful in terms of materials recovery: had over 800,000 items returned.
    - UMS is currently working only with MPL patrons.
    - Cost neutral – fees recovered from patrons fully reimburse MPL for UMS service costs, plus materials are recovered (MPL charges \$15 to patron account in the form of a 'Manual Charge' to cover UMS service and MPL administrative fees).
- Issues and Points to consider
  - Reduces duplication of effort: after final MCFLS 'Statement of Charges' letter is sent, patrons may receive multiple additional follow-up contacts from different libraries regarding return of 'billed' library materials – sometimes by owning library, sometimes by law enforcement (if requested by owning library), sometimes both.
  - Completes undeliverable notices: UMS conducts additional address and phone tracing if contact info on file with MCFLS is incorrect. MCFLS does not do this.
  - Service consistency: Other MCFLS member libraries looking for consistency/uniformity and better success with retrieving unreturned items.
  - Payment plan?: For patrons in collections, optional MPL payment plan suspends a patron from collections and allows them use of public computers while in repayment. Sheila O'Brien noted that Greenfield does see patron follow-through when they sign up for Greenfield payment plans.
  - 90 day no risk guarantee (summary attached)

Brown Deer fees and unreturned items status:

- Brown Deer adult residents with current library cards, fees over \$25, at least one billed item more than 28 days overdue:
  - 29 patrons, 74 items with \$2238 total value, average \$77 each
  - 3 patrons between \$100-150
  - 1 patron at \$778
  - OoP cost to collect at \$8.95 each = \$645
  
- Brown Deer adult residents with cards expired in 2015, fees over \$25, at least one billed item more than 28 days overdue:
  - 1 patron, \$42 total value



# UNIQUE

*Management Services, Inc.*

LIBRARY DIVISION

[www.unique-mgmt.com](http://www.unique-mgmt.com)

1.800.879.5453

## Contacts

**Richard A. Neal**  
Strategic Partnerships & Sales Manager  
[dneal@unique-mgmt.com](mailto:dneal@unique-mgmt.com)

**Jonathan Hayes**  
Assistant Sales Manager  
[jhayes@unique-mgmt.com](mailto:jhayes@unique-mgmt.com)

# UNIQUE

*Management Services, Inc.*

LIBRARY DIVISION

*As the leading material recovery service for libraries, Unique Management Services will grow through constant dedication to excellence in customer service, quality, value and strategic partnerships. We will build our reputation on effective and flexible solutions, accuracy, innovation and creative use of technology, the highest professional and ethical standards, and competitive pricing.*

**UNIQUE** *Management Services, Inc.*

**Jonathan Hayes**

*Manager, North American Sales*

119 East Maple Street, Jeffersonville, IN 47130

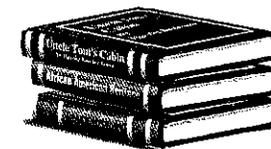
Phone 800-879-5453  
Cell 812-987-1796

[jhayes@unique-mgmt.com](mailto:jhayes@unique-mgmt.com)  
[www.unique-mgmt.com](http://www.unique-mgmt.com)

Exhibit 1 to Minutes (08/04/16)  
Attachment A (09/01/16)  
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# Library Specialists



## Testimonials

### GREENWICH COUNCIL LIBRARY IN LONDON, ENGLAND

“When we, i.e. Greenwich Library and Information Service, first made the decision to go with Unique Management Services, the least of my concerns was how we would communicate across the Atlantic in the context of immediate response. The staff at Unique were extremely patient during the course of the following few months. We had already built a rapport with some individuals. The most successful part of this arrangement is that we regard Unique as agents working on our behalf, and that feeling seems to be reciprocated. We exchange emails as if we were dealing with another Council department, we even telephone occasionally, and this just feels as if we’re talking to a library down the road, and the real difference in the relationship compared to dealing with other agents (whatever the purpose) is that we all seem to be talking the same language. The service we receive is pleasant, efficient, understanding and best of all it seems to be run by friends.”

*Steve Woods, Group Library Manager*

### SALT LAKE COUNTY LIBRARY SYSTEM

“Our relationship with Unique Management Services has been great! Their “unique” approach to library collections has resulted in increased revenues to the Library System as well as the return of many long overdue items to our collection. Once the staff got comfortable with the system and were able to answer patron questions regarding the use of a collections firm, things in our system have gone well. We appreciate their help!”

*Mike Sioker, Finance and Operations Manager*

### ROCHESTER HILLS PUBLIC LIBRARY

“Since going with Unique Management Services, we have collected over 91% of the balances owed to the Library in combinations of returned materials and fines owed. Very little staff time is required on our part and all of the needed information is maintained on our computers. It’s a very reliable and easy process.”

*Ginger Olsen, Head of Circulation*

### FAIRFAX COUNTY PUBLIC LIBRARY

“Unique Management has been extremely helpful and cooperative in all phases of our implementation of their services. Their presentations have been articulate and well-prepared; their responses to our questions have been quick and supportive. The details in their reporting service have streamlined the tracking process for our financial management office and made life simpler for in-branch staff as well.”

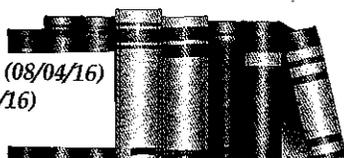
*Elaine Price, Circulation Services Manager*

### MONTGOMERY COUNTY PUBLIC LIBRARIES

“Unique has been great to us and is a company that “walks the talk.” All of the staff at Unique are great to work with, we just consider them an extension of our library and many times forget they are even a vendor. I had several of my training cards go through collection and like customers I ignore the notices and received phone calls from the call center. They did not know that I was actually library staff. I was very impressed with the way they treated me each time. I was reassured that our customers would be treated with the same respect and would receive good customer service from the entire Unique Staff.”

*Cathy Greulich, Circulation Manager*

Exhibit 1 to Minutes (08/04/16)  
Attachment A (09/01/16)  
Page 2 of 3



- Libraries are our ONLY clients.
- Libraries are unique and need specialized services to meet their recovery needs.
- Maintaining patron goodwill is our specialty and highest priority. Our **Gentle Nudge™** approach is key to your success.
- Our terminology, communications, processes, and procedures are designed just for libraries.
- To our knowledge, our service is the only one that guarantees an offer of budget neutrality.
- Because of our expertise, we help set up a simple interface with your library automation system to allow for a simple, accurate, and easy process for transferring patron accounts and activity information—minimizing or eliminating staff time required.
- We can share ideas and make recommendations based upon success at other libraries to help improve your own internal procedures.





# Features & Benefits

- Our service recovers overdue material with no loss of patron goodwill and provides a significant increase in the return of past-due material.
- Professional third-party intervention establishes urgency and redefines the patron's payment priority.
- There is a low fixed fee per patron processed, eliminating expensive percentage fees.
- Our Material Recovery System reduces costly internal procedures and allows staff to focus on patron services.
- When our Material Recovery System is used as recommended we can GUARANTEE that, in addition to returned material, you will receive enough money to pay our fees.
- Our comprehensive monthly reports give you the bottom line information you need in a format that is easy to understand and use.

# Strategic Partnerships

Unique Management Services has formed strategic partnerships with the major ILS Vendors to develop collection agency modules for the transference of information automatically and seamlessly helping to reduce staff time and errors. We have formed Strategic Partnerships with SirsiDynix, TLC/CARL, Polaris, VTLS, INFOR, Innovative Interfaces, Inc., Liblime, Talis and DS Limited.

Through these Strategic Partnerships, we assist our mutual clients in helping to reduce staff time and cost in recovering long overdue materials, fines and fees. This allows Library staff to deal with their most important asset . . . *Their Patrons.*

# 90-Day No-Risk Trial

The purpose of the 90-Day Trial is to let your library use our service the way it is designed and to measure results to determine if it provides a good solution.

Past due patron accounts with balances of \$25 or more should be turned over within 60 days past due as they occur during the trial period. There is no limit on the number of accounts that can be turned over for recovery.

Unique Management will work with library staff to determine the best way to submit patron account information and provide weekly updates.

*The Trial will allow Unique Management to prove that we can do the following:*

- I. Deliver excellent results in material and cash recovery
- II. Maintain patron goodwill
- III. Provide budget neutrality
- IV. Make the process simple and easy to minimize staff time required

Your Library will receive detailed reports monthly, showing the status of each patron account and summary of the results to date.

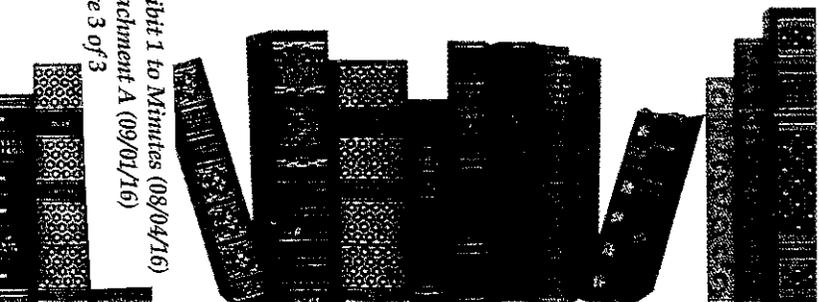
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Exhibit 1 to Minutes (08/04/16)  
Attachment A (09/01/16)  
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# EXECUTIVE SUMMARY

## 90-Day No Risk Trial

Unique Management is willing to process past due patron accounts for 90 days. At the end of 90 days, if we are not completely satisfied, we may discontinue the service with no cost for the patron accounts processed. If we are pleased with results and satisfied with the service at the conclusion of the 90-Day Trial, we will be billed for the accounts processed during the trial. Library management will summarize results and make a recommendation at the conclusion of the trial.

## IMPORTANT INFORMATION

- A. Unique Management Services (UMS) is a company which specializes in recovering past due materials for libraries. UMS has over 1700 Library clients.
- B. UMS utilizes a "gentle nudge" approach that is designed to maintain patron goodwill. Maintaining patron goodwill is their highest priority.
- C. UMS has had tremendous success recovering material for libraries across Canada, the United States, the United Kingdom, Australia, and New Zealand. They have excellent references that verify their results.
- D. UMS charges a low fixed fee of \$8.95. This one time flat rate covers the entire 120-150 day recovery process. The average Library using UMS sees a \$4 to \$1 return on investment. For every \$1 spent on the service, the Library should see around \$4 worth of materials, cash, and waived amounts returned.
- E. UMS has formed relationships with all of the major ILS vendors, and helped them develop collection agency software. This software completely automates the process of sending patron accounts that qualify for collection and tracking recoveries as patrons respond.
- F. All reports, letters, telephone scripts, etc. are designed just for libraries.

## SUMMARY

The 90-day trial will allow the library to measure program effectiveness in terms of: recovering materials, ability to maintain patron goodwill, and ease of use by library staff.

## Milwaukee Public Library & UMS – Fact Sheet

### Contract

- MPL began utilizing Unique Management Service (UMS) for collections on March 1, 2010.
- MPL accounts with balances of \$25 or more and 60 days overdue are referred. (MBLOCK)
- Referrals went back to January 1, 1999.
- Referral cost is \$8.95 per account. Referral fee of \$15 is added to each patron account.
- June 15, 2016 is the last day the credit bureaus will accept library debt of any type to figure credit scores. This shift by the credit bureaus includes many other types of debt as well. On June 15, 2016, all previously credit reported accounts will be removed from the patron's credit scores as well. UMS will still have records of the debt in their system and the library is allowed to keep the debt on their records.

### UMS Account Status through December 31, 2015

*From UMS Account Status Report, cumulative from contract inception in March 2010.*

- 41,287 accounts have been submitted.
- 32,732 accounts have been contacted (8,555 had bad addresses).
- Majority of recovery comes within the first 120-Days of UMS process.
  - Three letters
  - Two phone calls
  - Multiple national change of address (NCOA) checks.
  - Includes skip tracing, extra letters for patrons making payments, and strategic contacts.
- 18,970 or 58% of these accounts have responded with payments and/or by returning materials.
- On average over the last 13 months, 468 accounts per month are referred to UMS.

### MPL Policies and Procedures

On February 1, 2015, MPL instituted a new Payment Plan and Fee Waiving Policy and Procedure. Issues that impact fines that may be waived by front line or managerial staff:

- Fines may be waived if they meet guideline waives per MPL procedure.
- Fines that do not meet the established guidelines may be disputed and considered for exception waiving by MPL Managers.
- Collection agency fine cannot be waived.
- Payment plans may be established by patrons. During an active payment plan, patrons are suspended from UMS reports until the patron has paid the balance. If the patron does not meet the terms of the payment plan, the account is referred back to UMS.

Collection Agency Simulation

	\$5 or More Money Owed		\$25 or More Money Owed		\$50 or More Money Owed	
	# of Patrons	Amount	# of Patrons	Amount	# of Patrons	Amount
Brown Deer Public Library	135	\$3,199.56	44	\$2,084.17	15	\$ 1,076.63
Cudahy Family Library	306	\$13,183.88	94	\$10,822.71	41	\$ 8,984.19
Franklin Public Library	310	\$7,593.80	75	\$5,068.35	33	\$ 3,671.53
Greendale Public Library	166	\$3,844.63	48	\$2,505.58	17	\$ 1,484.85
Greenfield Public Library	327	\$8,529.63	84	\$5,752.55	30	\$ 3,877.09
Hales Corners Library	76	\$1,882.75	12	\$1,244.74	7	\$ 1,074.57
North Shore Library	269	\$5,162.72	59	\$2,837.40	15	\$ 1,312.53
Oak Creek Public Library	284	\$6,646.05	77	\$4,389.47	28	\$ 2,848.34
Shorewood Public Library	280	\$7,435.72	79	\$5,362.02	30	\$ 3,682.50
South Milwaukee Public Library	293	\$11,183.49	116	\$9,096.78	51	\$ 6,961.10
St. Francis Public Library	99	\$2,504.62	32	\$1,732.53	11	\$ 1,041.13
Wauwatosa Public Library	851	\$19,719.00	202	\$12,732.79	72	\$ 8,272.39
West Allis Public Library	888	\$28,070.81	328	\$21,917.93	151	\$ 15,789.39
Whitefish Bay Public Library	255	\$4,999.34	47	\$2,709.73	18	\$ 1,686.11
Totals	4539	\$123,956.00	1297	\$88,256.75	519	\$ 61,762.35
Average:		\$27.31		\$68.05		\$ 119.00

Please Note: Collection Agency Report allows us to target patrons with fines no older than a certain date. This allows the library to focus on newer fines and materials with a more likelihood of return. For the purposes of this simulation, the oldest fines allowed were those assessed on 01/01/2015 or later. Any patrons with fines older than this date were not included.

## C-85: Overdue Notices Procedure and Schedule

Overdue Notices are either emailed directly to patrons (the first option) or printed out on form stock and mailed bi-weekly to patrons on Tuesday and Friday mornings.

MCFLS only mails out **1 overdue notice**--it is mailed out:

- 14 days after an item is overdue for 7 and 21 day loans
- 7 days after an item is overdue for 3 day loans

There is no second overdue notice. Instead of a second overdue, items are first attached with a replacement fee in the following way:

- for 7 and 21 day loans, the item goes to replacement fee 14 days after the first overdue
- for 3 day loans the item goes to replacement fee 7 days after the first overdue.

The entire cycle to go to replacement fee is thus 28 days for 7 or 21 day loans and 14 days for 3 day loans. This fairly rapid method of getting items to the replacement fee stage effectively blocks the patron from doing anything. But it is also very possible that these replacement fee items also end up going to our Statement of Charges procedure, which is how MCFLS notifies patrons that a replacement fee has been attached to the item.

The procedure will result in Statements being sent out to all of those patrons if a particular patron owes anywhere from \$5 to \$50 (depending on the municipality) and has had something go to replacement fee in the recent past. This insures that the patrons do not receive Statements as repeats. The Statement of Charges procedure guarantees that a patron with items that have gone recently to replacement will be notified of these items without an undue number of costly notices being sent. The important factor is that it sends notices to patrons who have recently been delinquent, with a much higher likelihood of return.

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Created 8/26/2008 by Diane Ohotto

<http://www.mcfls.org/kb/KnowledgebaseArticle50162.aspx>

### C-52: Statement of Charges - Centralized

A. **Purpose** - A statement of charges is a summary of all outstanding money owed by a patron. Statements of charges can be printed for all patrons, or patrons can be selected for which to print statements based on patron record number range, patron type, total amount owed (from the MONEY OWED field), invoice number, or **boolean review file**. MCFLS has developed a methodology which creates a **systemwide boolean review file of patrons who owe at least \$5.00 with at least one item on the patron record having a due date 4-5 weeks prior**. It is important that all MCFLS libraries participate in this global procedure because a patron from a particular municipality may actually have delinquent charges on materials owned by other municipalities within MCFLS.

B. **Schedule** - A new MCFLS Statement of Charges list is created by the MCFLS Administrative Assistant every week on a Friday. It is labeled as the day it was printed, e.g. **Global Statement of Charges 02/26/10**. The MCFLS Administrative Assistant prints the Statement of Charges for all libraries and records the number of printed notices sent by each municipality. Notices sent via E-Mail do not count toward printing costs.

Libraries have the option of sending statement of charges to their own patrons that meet a particular MONEY OWED threshold of either \$5, \$25 or \$50. The current settings used by the software use these thresholds:

Library	Threshold Amount
Brown Deer	\$50
Cudahy	\$50
Franklin	\$25
Greendale	\$50
Greenfield	\$50
Hales Corners	\$25
Milwaukee	\$25
North Shore	\$50
Oak Creek	\$25
St. Francis	\$25
Shorewood	\$5
South Milwaukee	\$5

Wauwatosa	\$50
West Allis	\$25
Whitefish Bay	\$25

**C. Parameters of the Global Statement of Charges master list (created by MCFLS)**

List strategy, e.g. as list would be run on 3/26/2010 at least one item due between 4 and 5 weeks prior.

Present search range: p1000000x to p24968638

Find PATRON records that satisfy the following conditions

MONEY OWED => \$5.00 AND DUE DATE between 02-19-2010 & 02-26-2010

**D. Step-by-Step procedure (for libraries).** Libraries can search off of the Global master list to create a file of patrons for their municipality only. In Sierra Create Lists, use the following query as an example (this one uses Franklin). This search uses an existing review file, File 163 > Global Statement of Charges.

**Boolean Search**

Review File Name:

Store Record Type:

Review file:

Te...	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	RESIDENCE	equal to	10	

PATRON RESIDENCE equal to "10 "

**E. Example of Statement of Charges Notice**

Milwaukee Public Library  
814 W. Wisconsin Ave.  
Milwaukee, WI 53233-2385

LIBRARY BILL - FINAL NOTICE. You must return the following item(s) or pay replacement costs. Your library card is suspended and you may face legal action until this bill is resolved. You may pay online at <http://countycat.mcfls.org/>  
Wed Jul 26 2006

Inv # Description Amount

100341 REPLACEMENT What is creation science? / by Henry M. Morri \$20.00

100342 REPLACEMENT Dinosaurs: their discovery and their world... \$30.00 TOTAL \$50.00

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Created 7/18/2008 by [Diane Ohotto](#)

<http://www.mcfls.org/kb/KnowledgebaseArticle50130.aspx>

### **IIIb. USE OF PATRON DATA FOR COMMUNICATION AND MARKETING**

The Brown Deer Library has adopted the *MCFLS Guidelines for Use of Patron Data* (MCFLS Admin Manual Insert #A-11) with the further restriction that contact information not be used for direct solicitation for monetary donations.

The *MCFLS Guidelines for Use of Patron Data* is reproduced as Appendix K in this document.

### **IIIc. USE OF PATRON DATA FOR THE RETURN OF LIBRARY MATERIALS**

Pursuant to Wisconsin State Statutes 43.30 (b) the Brown Deer Library will exercise its right to share limited patron information with local law enforcement or contracted collection agencies to encourage the return of library materials. Though specific fee thresholds for pursuit of materials return or fee payment are at the discretion of the Library Director, action will likely be taken when unreturned Brown Deer Library material replacement costs exceed \$50 and are more than 60 days overdue.

***Approved: 4/11/16; Revised:***

## IVb. THEFT OF LIBRARY MATERIALS

The Library takes theft of materials very seriously. Using Wisconsin Statutes 939.49 (Defense of property and protection against retail theft) and 943.61 (Theft of Library Materials) as guidelines, the following policy is established.

### **Failure to Return Library Materials**

Brown Deer Village Municipal Code Sec. 34-61. - Failure to return library books and property.

*No person shall fail to return any book, periodical, pamphlet, audiovisual materials or other property belonging to or in charge of the village library. Any person who borrows or takes such property from the village library shall be deemed to have violated this section when he fails to return such property on or before the due date, as shown on the borrowing card, and after the village library or its agent shall have sent, by ordinary mail, to the person at the address at which he is registered with the library, a notice indicating that such failure constitutes a violation of this article. The penalty for violation of this section shall be in addition to any fines or charges imposed under any rules and policies established by the village library board.*

### **Removing Library Materials from Last Point of Checkout without Library Staff Permission**

Taking library materials past the last point of checkout without library Staff permission and/or activation of the security device is considered theft. When the security gate alarm sounds, Staff will ask Patron to come back inside the security gates. If Patron refuses, or claims not to have any library materials, the Patron is suspected of theft and Law Enforcement will be notified.

***Approved: 4/11/16; Revised:***